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NEWS

Shaping Wealth to Hold Its First Behavioral Finance-Focused Virtual Event

The inaugural--and free--two-hour BeFi Summit is set for Friday, Nov. 3.

Rob Burgess | Sep 25, 2023

Shaping Wealth, a company specializing in behavioral finance training and helping advisors understand the psychology of financial planning, on Friday announced that it would soon hold its first-ever behavioral finance-focused virtual event.

The inaugural BeFi Summit has been scheduled from 10 a.m. to noon CST Friday, Nov. 3 and will be free to attend.

Featured speakers at the event will include “The Millennial Money Fix” authors Doug and Heather Boneparth; Hal Hershfield, a professor at UCLA’s Anderson School of Management; Dr. Meghaan Lurtz, learning and development specialist at Shaping Wealth; and Ross Marino, CEO of Advisor 2X. One of the event’s 30-minute sessions will also include a practitioner’s panel.

Shaping Wealth was co-founded by Brian Portnoy. Joy Lere, a licensed clinical psychologist and the other co-founder of Shaping Wealth, was named as one of the “Ten to Watch in 2023” by *WealthManagement.com*.

Shaping Wealth offers different paths for advisors, including a 100-day experience called “Building the Behavioral Advisor,” which includes live teaching and cohort-based work for \$7,500 per individual (although family rates also are available). In November 2022, the organization launched a subscription-based membership program called OCBO, standing for “outsourced chief behavioral officer.” Shaping Wealth’s OCBO service, which runs between \$150 and \$200 per advisor/per month, operates akin to third-party tech support, letting smaller firms manage costs while benefiting from Shaping Wealth’s behavioral finance insights.